

# QUINCY RETIREMENT BOARD

Job Posting: **Retirement and Investment Operations Analyst**

Applications accepted until position is filled

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The City of Quincy Retirement System is seeking a highly qualified individual for the full time position of Retirement and Operations Analyst. The System operates in conformity with Massachusetts General Laws Chapter 32; Public Employee Retirement Administration Commission (PERAC) regulations and oversight

Information pertaining to the position, required qualifications and directions to apply are as follow:

Title: **Retirement and Investment Operations Analyst**

Summary: This position reports to the Executive Director of the Quincy Retirement Board. Responsible for assisting the Executive Director in the retirement and investment operations of the Quincy Retirement Board's office in conformity with Massachusetts General laws Chapter 32, Public Employee Retirement Administration Commission regulations and the Quincy Retirement Board's policies. Calculating retiree benefits, assisting members with retirement documentation, adherence to Chapter 32 guidelines, and familiarity with investment operations, and interface with Custodial Systems, data entry, work with PTG, interaction with PERAC, payroll, assisting QRS membership, and various other duties of more complex clerical functions.

Duties and Responsibilities:

- Prepare retirement calculations for members, including QRDO calculations and worker's compensation offsets.
- Prepare and submit all relevant information for retirement applications.
- Coordinate all activities pertaining to the system's appropriation data including working with member units to collect appropriate information.
- PTG member benefit payroll process, functions and execution including updating and implementing COLA's. Process, balance and execute monthly retiree payroll.
- At the direction of the Executive Director, prepare investment related documents and process investment transactions such as capital calls, redemptions and payment of management fees.
- Liaison with Investment Consultant for ongoing investment related activities.
- Enter cash receipts and disbursements in accounting system for review by Executive Director. Balance posted deductions to cash receipts.
- Act as Elections Officer for Board Member elections.
- Tracks and posts workers compensation cases.
- Assist the Executive Director and Senior Accountant in production of the Annual Statement.
- Assist in coordination for year –end 1099R for members and IRS reporting.

- Review all system unit payrolls for compliance with PERAC's regulations, M.G.L. Ch. 32 and the Quincy Retirement Board's rules and regulations.
- Attend and participate in staff, department or other meetings, seminars and conferences as directed by the Executive Director.
- Must have a working knowledge of Microsoft Office programs, Board Paq and willingness to learn and adapt as technologies change.
- Perform other duties as required or as necessitated.

### **Education/Experience**

A candidate for the Retirement and Operations Analyst Position should have experience in the investment, retirement or public employment field. A Bachelor's degree in accounting, finance or business is preferred. Experience working in the financial services industry is strongly preferred. The candidate should have a strong finance, math and accounting background. A working knowledge of PTG retirement software, MUNIS, M.G.L /Chapter 32 PERAC regulations and experience working with Custodial Bank (s) and Asset Managers. An ability to create and maintain documents using Microsoft Office applications including but not limited to Word, Excel and Power Point.

### **Salary and Benefits**

The salary for this position will be commensurate with experience. The hired professional will become a member of the Quincy Retirement System. Health, dental and life insurance, a flexible spending account plan, and a deferred comp 457 plan are available.

### **Application Timeline**

Applications accepted until position is filled.

### **To Apply for this Position**

Please email a cover letter of interest and resume and mail a copy of these documents to:

[lmcbirney@quincyma.gov](mailto:lmcbirney@quincyma.gov)

Lisa McBirney  
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